

Situational Leadership

Mastering the Single-Most Important Sales Management Skill



Situational Leadership: Round THREE

Team MATT Team DAVE

86.0%

86.6%



Most Missed Quiz Questions

Kyle is frustrated because another big deal he forecasted to close pushed to the next quarter. His manager let him vent his frustration but then helped him work on a close plan for key accounts in his pipeline. Kyle's manager is using:

Kyle's manager is using:

- A. Leadership Style 1
- B. Leadership Style 2
- C. Leadership Style 3
- D. Leadership Style 4



Most Missed Quiz Questions

Oliver is going over a form in Sales Force line by line by line with one of his sales team members who isn't filling it out completely. This salesperson knows how to fill out the form, and has done it many times before, she just doesn't think it's important because no one uses the information she provides.

Oliver is using:

- A. Style 1 for Development Level 1
- B. Style 1 for Development Level 2
- C. Style 1 for Development Level 3
- D. Style 1 for Development Level 4



Most Missed Quiz Questions

One of Mia's sales team members insists she's at Development Level 4 when it comes to setting next steps with a buyer. Mia disagrees, but instead of arguing with this rep, she's chosen to go with her assessment but checks in every other day or so about it. Mia is managing disagreement on development by:

Going with her rep's assessment but:

- A. Following up like Style 1
- B. Following up like Style 2
- C. Following up like Style 3
- D. Following up like Style 4





D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
S1	S2	S3	S4
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support

In the last four weeks, how have you been able to apply the principles of Situational Sales Leadership with your team?

You and your manager have a tense relationship. Although you would like to help more, he does not seem to recognize your expertise or respond to your interest in helping. Over the last two weeks, you have learned that your manager lacks confidence in establishing forecasts for a product line on which you are an expert. A quarterly report is due, and he has not sought your advice. Although he seems aware that he should use your help, he is hesitant about asking for it.

What is the **specific goal**?

What is this manager's competence in completing the goal?

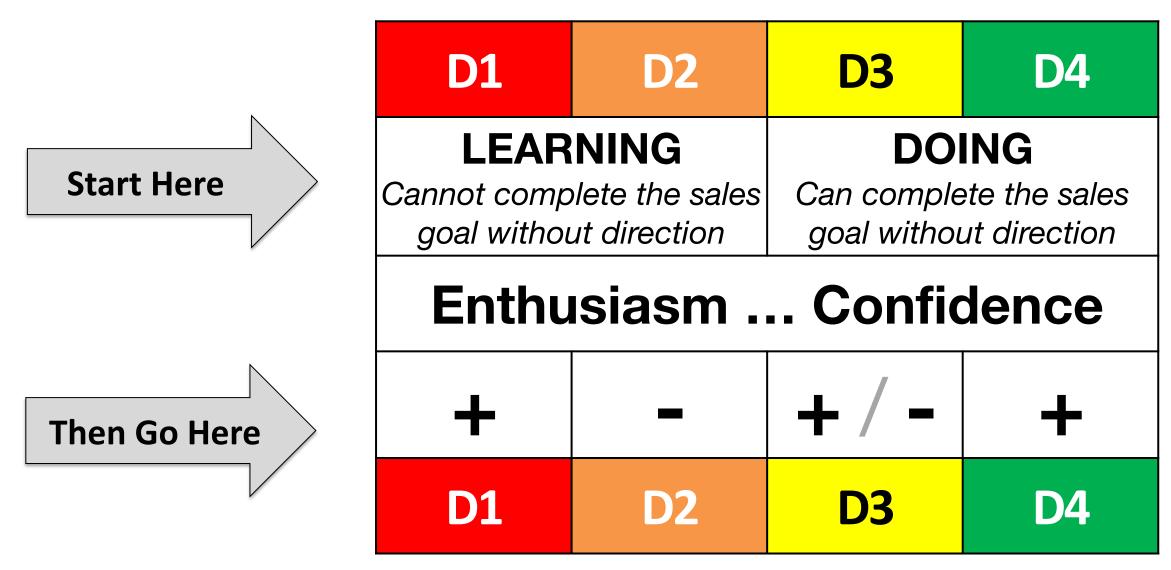
What is this manager's commitment in completing the goal?

What is his development level?

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- A. Talk with your manager and mention that you heard he is working on the quarterly forecast report. Be careful to avoid pushing the issue. Let him know that you are available if there is some way you can help.
- B. Tell your manager that you want to help with the forecast report. Advocate for a specific plan. Be detailed-oriented, brief, and concrete. Keep the discussion focused on your approach.
- C. Talk with your manager and mention that you heard he is working on the quarterly forecast report. Ask how the report is coming along. Delicately draw him out on the specifics on the report and ask open-ended questions that facilitate his thinking. Do not advocate for a position but work to help him reach his own conclusions.
- D. Talk with your manager about his forecast and offer your help on the quarterly report. Suggest specific alternatives and solutions that your manager might pursue on the project. Draw out his reactions to your plan and describe in detail the rationale for your approach. Stress to your manager that really all that concerns you is the success of the business.

Situational Leadership Decision Tree





Target Half Marathon Time:

2 hours and 15 minutes

Weekly Running Workouts:

Long runs
Tempo runs
Interval workouts
Recovery runs
Core exercises

Performance Goals Process Goals



Process Goals

Total sales by month, quarter, and year

Sales activities by day, week, and month



Process Goals

Total sales by month, quarter, and year

Sales activities by day, week, and month

Set as a sales quota each year

Repeated over and over again



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Total sales by month, quarter, and year

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Set as a sales quota each year

Repeated over and over again

What your salespeople need to achieve

How your salespeople will be able to achieve it



Process Goals

Total sales by month, quarter, and year

Sales activities by day, week, and month

Set as a sales quota each year

Repeated over and over again

What your salespeople need to achieve

How your salespeople will be able to achieve it

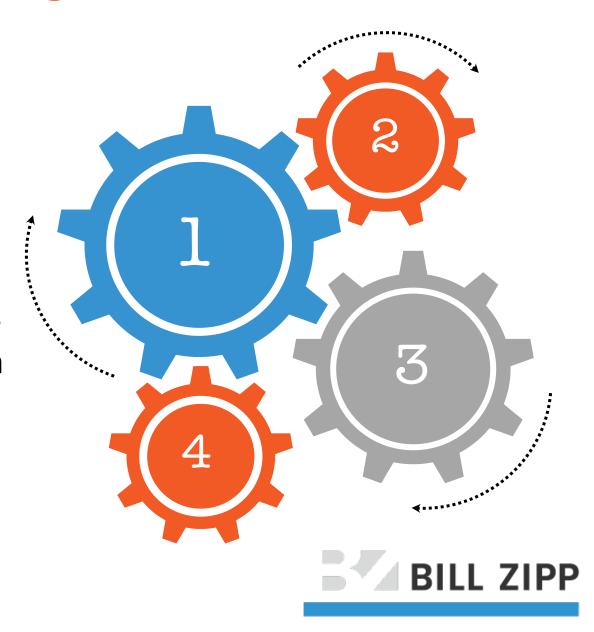
Target marathon time

Weekly running workouts



Four Keys to Good Goal Setting in Sales

- 1. Make annual sales goals clear and progress against goal current by week, month, and quarter.
- 2. **Define** the steps in your sales process, from first touch to won deal.
- **3. Identify** 2-3 steps in your sales process each rep needs to master and **focus** on those steps like a laser.
- 4. Measure progress on each step and identify new steps when mastery is attained.



Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
	☐ Low to Some☐ Mostly High	☐ Low to Variable☐ Mostly High		
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Reach out to new account list by sending an outreach email sequence to 75% of account base by end of Q1.	✓ Low to Some ☐ Mostly High	☐ Low to Variable ✓ Mostly High	D1	
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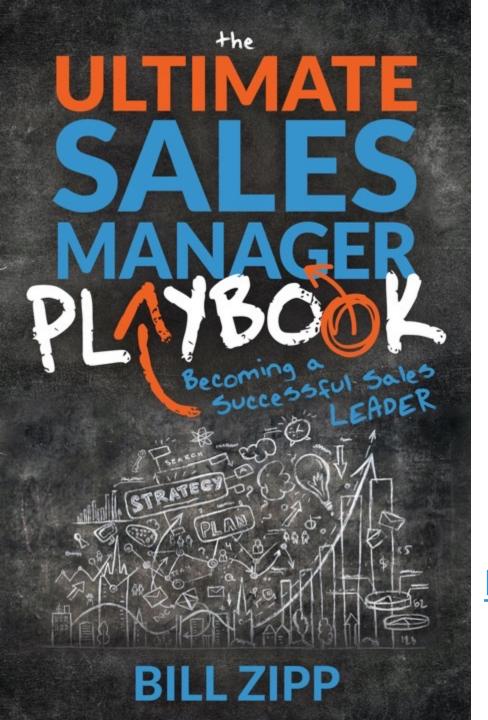
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Reach out to new account list by sending an outreach email sequence to 75% of account base by end of Q1.	✓ Low to Some ☐ Mostly High	☐ Low to Variable ✓ Mostly High	D1	Be very prescriptive. Tell exactly what to say, how to follow-up, how to structure the first meeting. Check-in briefly, daily.
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Create 12-16 cross-sell opportunities within existing account list by end of Q2.	✓ Low to Some ☐ Mostly High	✓ Low to Variable ☐ Mostly High	D2	
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Create 12-16 cross-sell opportunities within existing account list by end of Q2.	✓ Low to Some ☐ Mostly High	✓ Low to Variable ☐ Mostly High	D2	Lead with empathy, listen to concerns, but still be prescriptive. Uncover cross-sell customers. Shadow conversations with debrief, shadow rep's conversations with debrief.
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Take better control of deals by perfecting timeline through better use of upfront contracting and a 5-10% higher forecast per month.	☐ Low to Some ✓ Mostly High	✓ Low to Variable ☐ Mostly High	D3	Analyze BMW and grow B by asking lots of questions. Resist the urge to give advice. Get him to hear his own voice and set his own direction.

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Situational Leadership

February 7, 14, and 21

4:00 PM in London, 8:00 AM in Los Angeles

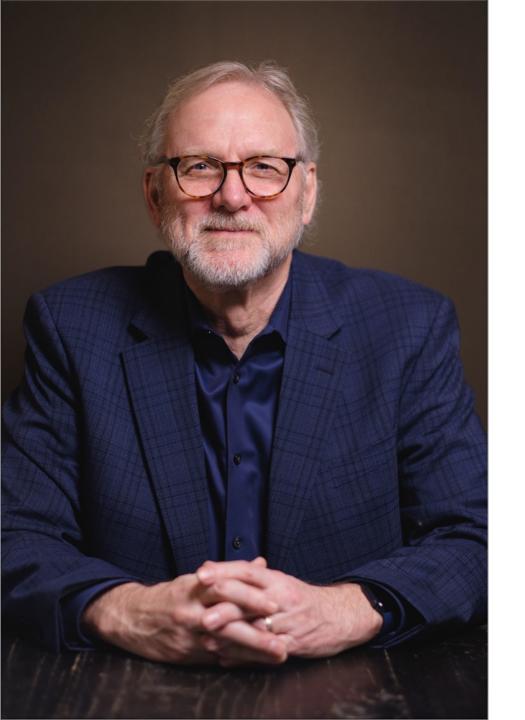
Do this field work before our next session:

Complete a Situational Coaching Planner for one team member.

Your Dedicated Web Resource Page:

https://billzipp.com/bighandsituationalleadership/













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